



UNITED STATES ENVIRONMENTAL PROTECTION AGENCY
WASHINGTON, DC 20460

OFFICE OF ADMINISTRATION
AND RESOURCES MANAGEMENT

October 24, 2013

Mr. Jango Unwalla
Unissant, Inc.
12310 Pinecrest Road, Suite 202
Reston, VA 20191

Dear Mr. Unwalla,

This is a request for proposal (RFP) PR-OARM-13-01056 for the U.S. Environmental Protection Agency (EPA) Office of Human Resources (OHR) 8(a) Sole Source requirement, in accordance with Federal Acquisition Rules (FAR) Part 19.8, to support Human Resources and Systems Operation Support services for OHR's Information Technology Division (ITD). ITD is a component of OHR within the Office of Administration and Resources Management (OARM), and is located in Washington, DC at EPA's headquarters site in the Federal Triangle complex.

The Contractor shall provide services in accordance with the terms, conditions, and specifications outlined in the attached Performance Work Statement (PWS). The Contractor shall provide all services, materials, supplies, supervision, labor, and equipment, except that specified as government furnished. In accordance with the requirements outlined in the PWS, the period of performance consists of one base year, with an additional one year option period. The NAICS code is 541512 Computer Systems Design Services to support this level of effort.

This request is for a proposal only and in no way obligates the Government to award a contract. The proposal shall be submitted via email to Lin Pinskey at pinskey.lin@epa.gov and Jennifer Scharrer at scharrer.jennifer@epa.gov by November 4, 2013 NLT 3:00 PM EST. Any questions associated with this request for proposal will be sent in writing to Lin Pinskey at pinskey.lin@epa.gov and Jennifer Scharrer at scharrer.jennifer@epa.gov.

You should develop a technical proposal, including deliverables, and separate cost/price proposal for this effort. All work shall be performed as a Labor-Hour type contract with a fixed blended hourly rate per labor category, times the amount of hours required to support this level of effort for both on and off site locations. The "blended" rate is for the purpose of accommodating the contractor to work both on and off site. Other Direct Costs will be invoiced based on actual costs.

Technical Approach - The offeror should propose how to fulfill the requirement as described in RFP Attachment #1 – Performance Work Statement (PWS). The technical proposal will be evaluated against the Technical Evaluation Criteria (RFP Attachment #2).

The Government may award a contract without discussions; therefore, the offeror's initial proposal should contain the best terms from a technical and cost/price standpoint. The Government reserves the right to conduct discussions if the Contracting Officer determines them to be necessary or in the best interest of the Government. In making the best value determination, the EPA will review the contractor's technical approach, along with price.

Sincerely,

Lin Pinskey
Contracting Officer

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

U.S. Environmental Protection Agency's PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

PERFORMANCE WORK STATEMENT (PWS)

****Major changes/updates from the current contract's PWS are highlighted in yellow****

1. TITLE:

Contractor to support PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business (HR LoB) Services for the Office of Human Resources (OHR) Information Technology Division (ITD).

2. PERIOD OF PERFORMANCE:

Base Year: 12/01/2013 through 11/30/2013
Option Year: 12/01/2014 through 11/30/2015

3. EPA COR/ACOR PERSONNEL:

Contracting Officer's Representative (COR):

To be provided at contract award

Alternate Contracting Officer's Representative (ACOR):

To be provided at contract award

4. PURPOSE:

The Contractor shall provide all services, materials, supplies, supervision, labor, and equipment, except that specified as government furnished, to perform Human Resources and System Operation Support services for the Office of Human Resources' Information Technology Division (ITD). The Contractor shall provide services in accordance with the terms, conditions, and specifications of this contract. In accordance with the requirements outlined in the PWS, the period of performance for this contract consists of one base year period with an additional one year option period.

During the period of performance base year EPA is nearing the end of the migration stage for the Human Resources Line of Business initiative scheduled for March 2014. EPA is migrating the Human Resources and Payroll functions to a Federal Shared Services Center (SSC), Department of Interior - Interior Business Center's (IBC) Federal Personnel/Payroll System (FPPS).

This contract will outline the various support and services that are required to support manage OHR/ITD's production activities of PeoplePlus, preparation for migration to IBC and post-migration activities. While the migration is scheduled to occur in March 2014, the PWS will include a contingency plan which will also be utilized in the event the migration target date is not met.

Background

4.1 Organizational Structure

The Information Technology Division (ITD) is a component of the Office of Human Resources (OHR) within the Office of Administration and Resources Management (OARM). The Office of Human Resources is located in Washington, DC at EPA's Headquarters site in the Federal Triangle complex; the office consists of six divisions: Human Capital Management, Employee Development and Services Division, Human Resources Policy Division, Headquarters Operations Division, Executive Resources Division and Information Technology Division.

This contract will focus on current production operations of the PeoplePlus system, which is pre-migration; migration support, and post-migration activities and Human Resource system Human Resources Line of Business migration technical support services. These services are supported by the Information Technology Division.

4.2 Information Technology Divisions' Functions

ITD is responsible for Information Technology (IT) planning, development and support for human resource services that affect EPA staff Agency-wide. The Director of Information Technology Division is the principal advisor to the Director of the Office of Human Resources on all major human resources technology systems and internal IT support and operations. The Director maintains close coordination with other pertinent EPA offices involved in IT development and provides input to Agency human resources information systems technology.

The ITD provides national leadership in conceptualizing and developing strategic systems to automate human resources at EPA. This includes conducting system research to determine applicability of automating a full range of human resource (HR) information and processes, including but not limited to:

- Direct access to HR information by line managers and HR professionals
- Employee self-service systems and/or electronic applications
- Modeling capabilities to support strategic decision-making
- Workforce analysis support
- Serves as the liaison with the Office of Environmental Information and Office of the Chief Financial Officer on IT issues and concerns
- Provides national leadership in the deployment, implementation, management and maintenance of human resources management systems
- Provides for systems budget formulation and contract oversight
- Support OHR/ITD with Human Resources Line of Business migration technical tasks

4.3 Management

4.3.1 Contracting Officer

The term Contracting Officer (CO) is used throughout this document. The term CO refers to the only person with the authority to obligate government funds and enter into, administer, terminate contracts. The CO will designate a specific technical representative, henceforth designated as the Contracting Officer Representative (COR) who may delegate contract oversight and

technical work approval authorities to specific government personnel as approved by the CO.

4.3.2 Manager and Key Personnel

The Contractor shall provide one PM who shall be responsible for the overall management and coordination of the work effort included in this PWS and shall act as the central POC with EPA management. The PM shall attend and participate in scheduled and unscheduled meetings to provide effective communication and discuss necessary information relevant to the terms and conditions of the award. These meetings may be held at on-site or off-site locations. The Contractor shall appoint an alternate to act for the PM if the PM will be unavailable for any reason. The Contractor shall notify the COR in advance of such appointment stating the period of time the alternate will be in place. The CO shall be notified in writing within five (5) business days of any changes in the individuals designated as key personnel.

4.3.3 Funding

This Contract will be incrementally funded.

4.3.4 Pricing

Contractors should provide an estimate of the amount of labor hours and cost to perform this work based on a period of performance of a base year and one award term year. All work shall be performed as a Labor Hour type task order with a fixed blended hourly rate per labor category, times the amount of hours required to support this level of effort for both on and off site locations. The "blended" rate is for the purpose of accommodating the contractor to work both on and off site. Other Direct Costs will be invoiced based on actual costs.

4.3.5 Contract Type

All work shall be performed as a Labor Hour type task order with a fixed blended hourly rate per labor category, times the amount of hours required to support this level of effort for both on and off site locations.

4.4 Transition Support

4.4.1 Close-out Plan

Upon completion of this contract, the Contractor will be required to develop a close-out plan. The close-out process should be performed in an orderly manner that will not disrupt day-to-day operations. The Contractor shall implement procedures to address at a minimum the following:

- Train and transfer contract task and responsibilities to the successor
- Prepare a complete inventory of government owned equipment
- Ensure all system documentation, including training manuals, Standard Operating Procedures (SOP), user and technical guides, have been provided to the COR
- Reconciliation of all financial accounts, requisitions, and work-in progress

The plan shall be submitted to the COR and Contracting Officer two (2) months prior to the contract completion date. All modifications to the plan shall be sent to the COR and Contracting Officer for approval prior to implementation.

4.4.2 Outgoing Transition

In accordance with this Contract, the Contractor shall provide a plan for 120 days of outgoing transition for transitioning work from an active contract to a follow-on contract/order or Government entity. This transition may be to a Government entity, another Contractor or the incumbent Contractor under a new contract/order. In accordance with the Government approved plan, the Contractor shall assist the Government in planning and implementing a complete transition from this order to a successor provider. This shall include formal coordination with Government staff and successor staff and management. It shall also include delivery of copies of existing policies and procedures, and delivery of required metrics and statistics. This transition plan shall include, but is not limited to:

- Availability of Key Resources
- Timelines/Milestones
- Coordination with Government representatives
- Review, evaluation and transition of current support services
- Review of current system processes
- Transfer of historic data to new Contractor
- Government approved training and certification process
- Transfer of hardware warranties and software licenses (if applicable)
- Transfer of all necessary business and/or technical documentation
- Transfer of compiled and un-compiled source code, to include all versions, maintenance updates and patches (if applicable)
- Orientation phase and program to introduce Government personnel, programs, and users to the Contractor's team, tools, methodologies, and business processes
- Disposition of Contractor purchased Government owned assets, including facilities, equipment, furniture, phone lines, computer equipment, etc.
- Transfer of Government Furnished Equipment (GFE) and Government Furnished Information (GFI), and GFE inventory management assistance
- Transfer of Documentation and Inventory
- Transfer of Comprehensive Security Plan
- Transfer of Confidential Business Information (CBI) and Chain of Custody Issues
- Applicable EPA debriefing and personal out-processing procedures
- Turn-in of all government keys, ID/access Cards, and security codes

4.5 General Administration

4.5.1 Project Management Meetings, Conferences, and Briefings

The Contractor shall attend, participate in, and furnish input to scheduled and unscheduled on-site and off-site meetings, conferences, and briefings that relate to the contracted functions and services as directed by the COR. The meetings frequency may be weekly, monthly, or as otherwise required.

4.5.2 Responsiveness

The Project Manager (PM) or the designated alternate PM and contractors working off-site shall be available during normal core work hours **8:00 am – 4:30 pm**, Monday through Friday, and

shall be available for telephone communication with the Contracting Officer's Representative (COR) within 30 minutes during non-core hours for system emergencies. Mechanical or electronic answering services do not meet the requirements of this paragraph.

4.5.3 Attendance

The Project Manager shall attend all monthly project status meetings and other meetings as required by the COR. Meeting attendees shall at times include Contractor managerial or other personnel knowledgeable of the subject matter.

4.5.4 Reporting Requirement

Meeting and administrative reports shall be provided to the COR within the required time frame. The report shall include an overview of discussion, action items, decisions, issues, person assigned to task and any other pertinent information.

4.5.5 Monthly Status Report

The Contractor shall report all work accomplished under the Contract and shall furnish the workload data monthly to the COR in letter and electronic format by close of business on the designated date.

4.5.6 Invoices

The Contractor should include the category (i.e. PeoplePlus Operations and Maintenance (O&M) and Human Resources Line of Business (HR LoB)) total monthly hours per labor category, cumulative hours, fiscal year balance and period of performance on the monthly invoices.

4.5.7 Contractor Personnel Locator Report

The Contractor shall provide a report listing all Contractor employees. Personnel include Project Manager and individuals pre-designated to perform Project Manager's duties in their absence (e.g., illness, vacation, and travel) of the Project Manager, and those individuals responsible and their designated backup for managing and supervising the work in each functional area of the PWS.

This listing will be for the express purpose of enabling the Government to locate these key Contractor personnel during non-duty hours. The "Key Personnel Locator Report" will provide the following information pertaining to each key employee:

- Name
- Position and Functional Area
- Phone, Alternative phone

4.5.8 Access to Data and Information

The Contractor shall ensure that all Contractor-generated technical records, reports, files, and other documentation are made available to the COR and other authorized Government representatives during the performance of this Contract. Documentation shall be centrally located at the Contractor's on-site offices at EPA. The Contractor shall obtain COR approval before releasing any information that has been stored, generated, or archived related to this Contract to the Contractor's corporate or other off-site offices, to other Government activities or agencies, to

other contractors, or to private parties.

4.5.9 Marking Proprietary Information

All records, files, reports, and data deemed proprietary by the Contractor should be clearly marked accordingly. The Government will make the final determination of the appropriateness of proprietary claims by the Contractor.

4.5.10 Agency Interest

The Contractor shall notify the COR immediately on matters within the scope of this contract, which affect ITD, government funds, or satisfactory performance of this contract.

4.5.11 Federal Holidays/Temporary Closure of EPA Facilities (EPA-H-42-103)

(a) (1) The Environmental Protection Agency observes the following days as federal holidays. The term "Federal holidays" as used in this clause shall mean only the following enumerated days and any other days hereafter declared National holidays by the President of the United States. Holidays falling on a Sunday will be observed on the following Monday. Holidays falling on a Saturday will be observed on the preceding Friday.

January 1	New Year's Day
January	Third Monday - Martin Luther King Day
February	Third Monday - Washington's Birthday
May	Last Monday - Memorial Day
July 4	Independence Day
September	First Monday - Labor Day
October	Second Monday - Columbus Day
November 11	Veterans Day
November	Fourth Thursday - Thanksgiving Day
December 25	Christmas Day

(2) Holiday observances of such days by Government personnel shall not be cause for additional period of performance or entitlement to compensation except as set forth in the contract. If the contractor's personnel work on a holiday, no form of holiday or other premium compensation will be reimbursed either as a direct or indirect cost, unless authorized pursuant to an overtime clause elsewhere in the contract.

(b)(1) EPA may close an EPA facility for all or a portion of a business day as a result of:

- i. Granting administrative leave to non-essential EPA employees (e.g., unanticipated holiday);
- ii. Inclement weather;
- iii. Failure of Congress to appropriate operational funds;
- iv. Any other day designated by Federal law, Executive Order or Presidential Proclamation; or
- v. Other reason as determined by the EPA (e.g., designated furlough day for federal workers).

(2) In such cases, contractor personnel not determined by the CO to be exempted (e.g., not performing mission-critical round-the-clock services/tasks) who are not already on duty at the facility shall not report to the facility. Such Contractor personnel already present shall be

dismissed and shall leave the facility.

(3) The Contractor agrees to continue to provide sufficient personnel to perform round-the-clock requirements of mission-critical services/tasks already in operation or scheduled for performance during the period in which EPA employees are dismissed, and shall be guided by any specific instructions of the CO or his/her duly authorized representative. In formulating instructions the CO or authorized representative may consider recommendations from regional/local EPA facilities management/operations staff.

(c) When Contractor personnel services are not required or provided due to closure of an EPA facility as described in paragraph (b), the contract price will be adjusted as follows:

(1) For fixed-price contracts, deductions in the Contractor's price will be computed as appropriate for the particular firm fixed price contract in question, e.g.,

(i) The deduction rate in dollars per day will be equal to the per-month contract price divided by 21 days per month. In this example, the 21-days-per-month figure was calculated as follows: 365 calendar days/year – 10 Federal holidays – 104 Saturdays/Sundays = 251 days/12 months = 20.92 days/month, rounded up to 21 days/month

(ii) The deduction rate in dollars per day will be multiplied by the number of days services are not required or provided. If services are provided for portions of days, appropriate adjustment will be made by the CO to ensure that the contractor is compensated for services provided.

(2) For cost-reimbursement, time-and-materials and labor-hour type contracts, EPA shall not reimburse, as direct costs, salaries or wages of contractor personnel for the period during which such personnel are dismissed from, or do not have access to, the facility.

(d) The contractor shall place identical requirements, including this paragraph, in all subcontracts that require performance of work on-site unless otherwise instructed by the CO.

4.5.12 Hours of Operation

The Contractor may be physically located on-site at 1200 Pennsylvania Avenue, NW Washington, DC or off-site. The Contractor's primary standard hours of operation shall include core time of 8:00 am to 4:30 pm, Monday through Friday. The Contractor may be required to work during non-core hours to complete a project and/or provide support during an emergency. The COR must approve all non-core hours.

4.5.13 Government Property

4.5.13.1 Furnished Space and Equipment - The contractor shall have access to EPA/ITD facilities during duty hours to perform tasks in accordance with this PWS. Government furnished space, equipment, hardware, and software will be provided to the contractor to perform the duties in accordance with this PWS. The contractor shall notify the Contracting Officer Representative (COR) immediately when any equipment breakdown occurs.

4.5.13.2 Government Data and Files

All data and files produced in support of this contract and all corresponding hard copy EPA record material are the sole property of the U.S. Government. While in control of the contractor, during data processing, and prior to delivery, all Government material shall be stored by the contractor in strict adherence with these requirements.

4.5.14 Emergency Situations

Emergency situations and contingency operations at EPA may require the Contractor to operate at times not considered normal operating hours, as directed by the COR. This normally involves utility outages, weather driven contingencies, or any work involving support for significant EPA technical and administrative services.

4.6 Quality Control and Quality Assurance

The Contractor shall ensure that the requirements of this Contract are met at the timeliness and quality levels specified by implementing a Contractor Quality Control Program. Contractor Quality Control is a contract delivery. The Government will validate the Contractor's Quality Control Program through its own Quality Assurance Surveillance Program.

4.6.1 Performance Evaluation Meetings

The Contractor's Site Manager shall meet periodically with the COR and the Government Quality Assurance Evaluator (QAE) to review Contract performance. Meetings shall include review and analyses of key process indicators, analyses of process deficiencies, and problem resolution. At these meetings, the COR and the Contractor will discuss Contractor's performance as viewed by the Government and particularly the reconciliation of the Government's Quality Assurance Inspection Findings with the Contractor's own Quality Control findings. The COR will take appropriate action to resolve outstanding issues. A mutual effort shall be made by the Contractor and COR to resolve any and all problems identified. Performance problems beyond the COR's control will be brought to the attention of the Contracting Officer.

4.6.2 Government Quality Assurance

The COR and Government QAEs will inspect for compliance with Contract terms throughout the Contract period. The Government will monitor the Contractor's performance under this Contract by performing checks as contained in the 'Surveillance Plan' listed as Attachment 3 of this PWS. Typical procedures include random sampling, planned sampling, scheduled inspections, incidental inspections, and validated customer complaints.

4.6.3 Responsibility for Rework

The Contractor shall be responsible for the cost of rework when the cause of the rework is the fault of the Contractor, Contractor employees, or subcontractors engaged by the Contractor. The Contractor shall be responsible for documenting costs associated with the rework to include direct labor costs, material costs, and subcontractor costs. The Contractor shall ensure that these costs are not charged to the Government.

4.7 Security and Privacy

4.7.1 Security Clearance/Background Checks

Clearance Required: All personnel must have a National Agency Check and Inquiries (NACI). Homeland Security Presidential Directive-12 (HSPD-12) is a Federal Government wide initiative to enhance security, increase Government efficiency, reduce identity fraud, and protect personal privacy by establishing a mandatory, Government-wide standard for secure and reliable forms of identification issued by the Federal Government to contractors and their employees.

Upon award, the Contractor shall submit a completed HSPD-12 form to provide information to the contract-level Contracting Officer Representative (i.e., Project Officer) to initiate the badging process. This requirement applies to contractor and subcontractor employees requiring access to EPA facilities or EPA information systems. If there is a requirement for contractor or subcontractor employees to have on-site access for at least 24 hours a week for at least 6 months a year they will be required to undergo a background investigation in order to receive an EPA Personnel Access and Security System (EPASS) badge.

The template was developed to assist in providing a uniform format for the transmission of the required contractor employee information. The template contains drop down menus when entering data in various data cells, i.e. Employee Type, Program Office, Work City and State, Birth State, Birth Country, Citizenship, Previous Investigation and Investigative Agency. *Right click* on "Contract People Template" to open the template or type the web address <http://www.epa.gov/oam/tempxls.xls> in a browser.

Please see RFP Attachment #3 'Personal Identity Verification (PIV) Procedures for Contractor Personnel.'

Also, please review Executive Order: Amending Executive Order 12989 <http://edocket.access.gpo.gov/2008/pdf/08-1348.pdf> which discusses new requirements regarding the use of Department of Homeland Security's E-Verify. [E-Verify Home Page](#) is located at Department of Homeland Security – U.S. Citizenship and Immigration Services website.

4.7.2 Identification Badges

Contractor personnel shall carry identification badges at all times when performing work under this contract or while in Government facilities and shall ensure that the badge is displayed at all times in accordance with local protocol. The Contractor shall not misuse his/her badge authority to solicit services from other EPA offices. The Government will collect the badges upon completion of services and or voluntary/unexpected terminations.

4.7.3 Physical Access

The Government will issue keys and/or door codes to contract personnel as appropriate for each facility. All keys will be issued to individual employees and not transferable. The Contractor shall maintain records to ensure accountability of keys. The Contractor is responsible for ensuring that keys are not lost or used by unauthorized persons. The Contractor shall not duplicate Government keys unless authorized by the Government. Upon termination, the employee shall immediately return his/her identification badge and keys to the Government.

4.7.4 Contractor Personnel Security Requirements 1752.204-70 (Jan 2008)

Contractors are responsible for the security, integrity and appropriate authorized use of their systems interfacing with the Government and or used for the transaction of any and all Government business. The Government, through the Government's Contracting Officer, may require the use or modification of security and/or secure communications technologies related to Government systems access and use.

4.7.5 Protecting Personally Identifiable (PII)

This clause applies to contractor personnel and addresses specific OPM requirements in addition to those included in the Privacy Act of 1974 (5 U.S.C. 552a - the Act). The following should not be construed to alter or diminish civil and/or criminal liabilities provided under the Act.

<http://www.whitehouse.gov/sites/default/files/omb/assets/omb/memoranda/fv2007/m07-16.pdf>

4.7.5 EPA Standards and Federal Policy

The Contractor must abide by all EPA regulations, policies, and procedures while in effect during the contract period of performance. As a minimum, the Contractor shall conform to and abide by the following:

Federal Policies and Regulations:

Government Paperwork Elimination Act (GPEA)	http://www.whitehouse.gov/omb/inforeg/gpea_progress_report2003.pdf - 155.2KB
Records management guidance for agencies implementing electronic signature technologies	http://www.whitehouse.gov/omb/memoranda/m00-15.html - 29.6KB
Information Technology Management Reform Act	http://www.whitehouse.gov/omb/memoranda/m97-07.html - 29.3KB
Electronic Signatures in Global and National Commerce Act (ESIGN)	http://www.whitehouse.gov/omb/memoranda/m00-15.html - 29.6KB
Section 508 Compliance	Http://www.access-board.gov/sec508/508standards.htm
Government Information Security Reform Act	http://www.whitehouse.gov/omb/memoranda/m01-08.pdf
Federal Information Processing Standards Publications (FIPS PUBS)	http://www.itl.nist.gov/fipspubs/
Privacy Act Policies	http://www.whitehouse.gov/omb/memoranda_m01-05/
OMB Circular A130	http://www.whitehouse.gov/omb/circulars/a130/appendix_i_ii.pdf - 57.7KB
OMB Memorandum on Agency Architecture Development	http://www.whitehouse.gov/omb/memoranda/m97-16.html
OPM Migration Planning Guidance	http://www.opm.gov.edgekey.net/egov/documents/MPG/index.asp
FEMA Guidance for COOP	http://www.fema.gov/pdf/library/fpc66.pdf

EPA Policy and Procedures:

Information Technology Architecture Roadmap (ITARM)	http://basin.rtpnc.epa.gov/ntsd/ITARoadmap.nsf
EPA Privacy Policy	http://intranet.epa.gov/oei/imitpolicy/qic/pdfs/cio2151.0.pdf
EPA Web Guide	http://www.epa.gov/webguide/index.html
Agency Network Security Policy Order Number 2195.1A4	http://intranet.epa.gov/rmpolicy/ads/transorders.htm
Flexiplace Policy – EPA Order 3180	http://intranet.epa.gov/ohr/rmpolicy/hr/3180.pdf

5. TASKS

This contract will focus on Human Resource system support services, which is supported by the Information Technology Division. During EPA Human Resources and Payroll migration phase up to 'Go-Live' to IBC FPPS, the Contractor will provide PeoplePlus Operation and Maintenance services and Human Resources Line of Business support. Once EPA is 'Live' in IBC FPPS, the contractor's primary responsibility will be to provide support for historical data migration and PeopleSoft decommissioning as defined in the respective project plan(s), and to provide routine reporting support via PeoplePlus until such time as PeopleSoft is no longer the Agency's authoritative support for all data and is decommissioned. Additionally, the contractor shall provide any operations and maintenance support that is required to ensure the PeopleSoft continues to operate and provide data until it is decommissioned.

DURING MIGRATION TO GO-LIVE TO IBC

If the scheduled March 2014 migration is not met, the contractor will continue providing OHR/ITD Operational and Maintenance services and support.

(a) PeoplePlus Tasks (O&M/Optional)

- O&M of Production
- Generate Reports
- Update and Monitor O&M Interface Files
- Analyze Issues' Root Causes, recommend and implement approved solutions
- Apply System Regulated Customization and Upgrade
- Follow and Maintain Configuration Management
- Maintain and support PeoplePlus Human Resources Infrastructure and data administration
- Create and Maintain all Operation, System and User Documentation
- Provide Required Status Updates

(b) HR LOB Tasks

- Map and Convert Data Interfaces
- Analyze Data Errors (Optional)
- Capture, Verify and Export Historical to IBC

AFTER 'GO LIVE' TO IBC

- Migrate EPA's Human Resources (HR) historical data in PeoplePlus to IBC's Datamart
- Generate HR reports with historical and current data stored in IBC's Datamart
- Decommission PeoplePlus

Task 1 Project Management (O&M/Optional)

The Contractor shall manage the scope, schedule and cost of all activities in accordance with the PWS and the Contractor's approved Work Plan. The schedule shall conform to EPA schedules for system modifications, interfaces and migrations as identified in this PWS. The Contractor shall plan, manage and perform all contract activities in accord with both project management and system development best practices.

Subtask 1.1 Project Planning and Management

The Contractor shall manage all work conducted under this contract, including project planning and scheduling, staffing, quality assurance, configuration management, risk and issue management and financial management, earned value management, progress and status reporting.

The Contractor shall staff the project with an appropriate number of highly qualified staff in order to satisfy program objectives, and organize this staff to maximize efficient sharing of the workload, effective communications, and knowledge transfer and re-use.

The Contractor shall establish a formal team responsible for efficient and effective administration and control of all work performed under this contract. The Contractor shall ensure that a clear line of project authority exists among all organizational elements (including subcontractors) and shall establish roles, responsibilities, and reporting requirements for each organizational element. The Contractor shall ensure that adequate resources are dedicated to satisfy the requirements of any planned activity. *The Contractor's program organization shall be adequately flexible to respond rapidly to changes as the program evolves.* Work will be performed at the EPA Headquarters site at Federal Triangle, Washington, DC or off-site with remote access via AAA token.

The Contractor shall maintain Project Management Plan's (PMP) for all major projects. The PMP shall describe activities and detail work products and deliverables to be provided during the base year of the contract. The PMP shall detail the Contractor's organization and management processes. The Contractor shall maintain the PMP as required. Updates will be made on an as-required basis to reflect changes and updates in particular management processes or changes in Government requirements.

The Contractor shall deliver and maintain an integrated Master Project Plan (MPP) in Microsoft Project. The MPP shall include the higher levels (to the 4th level at a minimum) of the contract Work Breakdown Structure (WBS), contract and government milestones, activity start and completion dates, deliverable due dates, as well as dependencies among WBS activities. The Contractor shall also develop and maintain detailed project schedules and staffing plans for each of the major projects and activities to be performed by the Contractor during the base year of the contract. The master and detailed program schedules shall be developed in coordination with the government and shall be maintained on a regular basis. Detailed project schedules will be reviewed with EPA staff on a regular basis and will be maintained in a central location for shared access by all EPA and Contractor personnel. The Contractor shall develop and maintain detailed project plans for each major activity or project identified on the MPP.

Subtask 1.2 Status Reporting and Communications

The Contractor shall provide regular status reports, including weekly project status reports, monthly status and system reports (i.e. performance, backups, system availability, and storage capacity) and other information required by the government to support the performance objectives as outlined in this PWS.

The monthly status reports, at a minimum should include, status of task orders in progress; financial and schedule status; staffing requirements and issues; review of milestones; issues and risks; technical accomplishments; and planned activities.

The Contractor shall continue to provide weekly status reports summarizing progress against planned activities for the week. The weekly report shall be made available on the day specified by the COR.

Task 2 Information Technology Support Services

Task 2.1 PeoplePlus System

The Environmental Protection Agency's personnel and Time and Labor functions are performed by the Agency's PeoplePlus system. PeoplePlus is an integrated application that uses Oracle's PeopleSoft Human Resource, Benefits, Time and Labor modules. EPA's Office of the Chief Financial Officer (OCFO) and the Office of Administration and Resource Management (OARM) implemented PeoplePlus in October 2004.

PeoplePlus is the Agency's centralized system for HR and employee benefits data. It is the official repository for HR data on employees, positions, and organizations. It is the core of human resource activities that support human capital management.

PeoplePlus HR (PPL HR) application is a solution for managing an employee's entire lifecycle. It automates many of the administrative tasks that occupy a great deal of time, allowing HR staff to focus on core business functions. By streamlining certain administrative tasks, human resource managers can focus on strategic activities such as recruitment, workforce planning, and competency management to align employee skills with organizational objectives.

PeoplePlus is the backbone of personnel administration; it has automated tasks such as time and labor processing, benefits administration, pay/step and grade administration, history/turnover

analysis and position control. The system allows staff to perform routine HR processes in a more efficient and timely manner. They are able to access the information immediately and generate reports to make informed management decisions. The application streamlines the routine activities and brings consistency and clarity to HR processes and procedures.

- The PeoplePlus system provides the following benefits to the Agency:
- Ability to record, review and approve time and attendance information online
- Standardized and easier access to human resources data, reporting, and decision-making processes
- Increased system flexibility to readily adapt to changing needs and requirements
- Effective and efficient infrastructure to integrate with other Federal and Agency administrative and programmatic systems
- Reduced operating cost
- Increased system flexibility to more easily adapt to changing needs and requirements both within and outside the Agency
- Improved systems security and data integrity
- Reduced administrative burden for staff involved in Time and Labor and human resource operations.

This contract supports the Human Resources functionality of PeoplePlus which is based on PeopleSoft HRMS-Federal (version 8.3 or version 8.9) and is integrated with PeopleSoft Time and Labor modules.

Ongoing support for PeopleSoft will continue until the scheduled March 2014 "Go Live" date for IBC's FPPS. Should this date not be met, ongoing PeoplePlus will continue until such time as EPA completes the migration.

Task 2.1.1 Goals and Objectives

The scope of the PPL-HR contract will cover the HR portion of operations and maintenance (O&M). The main goals of this contract are as follows:

- Ensure the availability and reliability of the PPL development environment.
- Complete all efforts to plan, analyze, design, implement and deploy fixes and/or enhancements to the production human resources management system.
- Provide improved support for the preparation and dissemination of reports management
- Review, analyze and interpret changes to laws and regulations that affect HR supported systems.
- Maintain the Enterprise Human Resource Integration (EHRI) interfaces such as eOPF, CPDF, and e-Training.

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Task 2.2 Information Technology (IT) Support Services (Operations & Maintenance)

The required IT support services cover operations and maintenance work that is needed to sustain the PeoplePlus system. The following tasks must be performed at an acceptable level throughout the term of the contract.

Task 2.2.1 Maintain PeoplePlus Human Resource System

Operations and maintenance support for PeoplePlus includes the following areas: database administration, infrastructure support, report management, problem resolution system customization/upgrades and all PeoplePlus interfaces sent to OPM, DOL and DFAS updates and daily interface files.

Task 2.2.2 Database Administration

The Contractor shall perform PeoplePlus and Oracle database administration, which includes, but not limited to, archiving, upgrades, consistency checks, patches/fixes, maintaining indexes, performance tuning, retrieval functionality, migration, monitoring, replication issues, and space management.

Task 2.2.3 Infrastructure Support

The Contractor shall ensure that all PeoplePlus development systems remain available and operational, unless a scheduled shutdown is required for maintenance. The Contractor shall be responsible for backup and recovery activities including onsite and offsite storage of backup media. The Contractor shall be responsible for all monthly maintenance activities, including reboot, updates to software and firmware, replacement of defective hardware that was not a critical replacement during production hours, and any other maintenance activities deemed necessary to continue the smooth operations of PeoplePlus development systems. The Contractor shall operate, administer, and maintain the hardware and system and application software required to keep the PeopleSoft Development applications available for use by OHR and OCFO users as appropriate.

In addition, the Contractor shall monitor the life expectancy of the hardware and software and inform the COR if upgrades are needed to prevent equipment and software from being outdated and/or no longer supported by the vendor.

The Contractor shall be responsible for tracking key system metrics which indicate system availability, performance, usage, and capacity. Metrics should include system availability and system downtime; system response time (e.g., average user response time for each system); and system load, capacity and utilization (e.g., CPU, database, and memory utilization and capacity). These metrics, together with any planned and unplanned system events and activities, shall be tracked and provided to the government on a regular basis (either weekly or monthly).

The Contract will be required to use the following software to support the system: PeopleSoft, Quest Software (Toad and Stat) and Oracle.

Task 2.2.4 Report Management

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The Contractor shall be responsible for developing, modifying, and executing new and existing HR reports for EPA staff agency-wide. HR reports will be generated in PeoplePlus using SQR programming or Query Manager. Therefore, the Contractor assigned to this task must understand PeopleSoft's HR PeoplePlus module and Datamart, IBC's Hyperion based system to in order to generate reports. This will include integrating present and historical data per request. This includes formatting the data statistically so that it can be displayed on the web or downloaded into a software package such as Excel. In addition, to generating and modifying reports, the Contractor shall support the overall reporting strategy for troubleshooting report issues, documenting report procedures and providing one-on-one and/or group training, if necessary. Specific responsibilities would include:

- Confer with HR staff to identify needs and recommend reporting solutions and strategies to more effectively serve HR staff as well as other agency employees.
- Interface with Human Resource personnel to evaluate business requirements for enhancements or modifications for reports.
- Review several existing PeopleSoft reports to identify and correct instances of inefficiency.
- Define functional specifications for new report enhancements, ad hoc and standard report requests.
- Respond to requests for ad hoc queries to meet the requirements of Human Resource management and staff.
- Assist in automating and streamlining processes to enhance information and report accuracy (e.g. converting a manual report to a scheduled process).
- Develop and maintain OHR departmental reports, forms and queries by extracting data from PeopleSoft tables using PeopleSoft query tool and SQR or from IBC's Datamart.
- Develop historical data reports that match Datamart reports when report requests overlap both systems, until data migration is complete.
- Create documentation to support any process changes associated with creating or modifying existing reports or data requests.
- Work with users to provide acceptance testing of new report features or systems enhancements.
- Recommend solutions to enhance the report process to prevent performance and degradation issues.

Task 2.2.5 Problem Resolution

The Agency uses HR PeoplePlus coordinators as the first tier support to address employee system and non-system HR issues. Contractor shall produce reports for HR community that identifies negative data anomalies (debt creations, TSP refunds, NTE expiration dates, daily edits. etc.). Most of the PeoplePlus HR coordinators are HR Specialists and there is at least one person assigned in HQ, and at least one in each SSC. If the HR PeoplePlus Coordinator is unable to resolve the issue then they will contact someone from the 2nd Tier support, PeoplePlus Customer Assistance Staff (PPL CAS). The PPL CAS resides in OHR's Information Technology Division; they provide technical and functional PeoplePlus HR assistance to the PeoplePlus HR coordinators. The Contractor shall troubleshoot and correct HR system problems received via Stat from the PPL CAS. Although PPL CAS is the second line of support, if problems cannot be resolved at this level, they are then escalated to Tier 3, which is the technical contract support

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staff. The technical contract staff is then required to analyze the ticket to determine whether the problem is caused by user error or system defect. If it is a system problem, the Contractor will recommend a solution and implement upon approval from the EPA Technical or Functional Lead.

Task 2.2.6 System Customization/Upgrade

The Contractor shall design, develop, code, test and deploy changes to the system as needed. System modifications may be required to satisfy customer request, new interfaces, software upgrades or to comply with new EPA/Federal HR policy. These system changes should comply with Section 508 and conduct research to ensure that the code complies with 36 CFR Part 1194 – Section 508 of the Rehabilitation Act (29 U.S.C. 794d). Contractor shall follow its established and documented approach to software development and use best practices to enhance the PeoplePlus HR application when addressing new requirements, known defects, and features approved by the government.

If PeoplePlus is upgraded to a more current version, the contractor shall provide assistance with the upgrade, as it affects OHR modules, and develop and execute a test plan that provides definitive results to qualify a “Go” decision. Test results shall be recorded and provided to the COR.

PeoplePlus maintenance activities after the IBC FPPS implementation will be restricted to only those activities that are required to ensure the PeoplePlus data can be successfully migrated to Datamart.

The Contractor shall provide functional and technical support with implementing the PPL workflow modules. The PPL workflow modules enable users to electronically route and process HR documents, truly implementing a comprehensive electronic office. HR documents can be approved and processed electronically implementing a complete end-to-end process.

Configuration management and version control shall be rigorously enforced on all components of the PeoplePlus application.

Task 2.2.7 Maintenance of EHRI Interfaces

The Enterprise Human Resources Integration (EHRI) is an e-government initiative that supports the President’s Management Agenda. It will support human resources management across the Federal government at all levels. There are three main EHRI initiatives, eOPF, CPDF and e-Training. When fully implemented, EHRI eOPF will replace current Official Personnel Folder (OPF) with an electronic employee record, resulting in a comprehensive electronic personnel data repository covering the entire life cycle of one’s Federal employment. EHRI replaces the current Civilian Personnel Data File (CPDF) transmission to Office of Personnel Management (OPM), and expands the transmission from 90 data elements to approximately 500 data elements covering human resources, payroll and training. In addition, to streamlining personnel data, the EHRI e-Training initiative will support the development of the Federal workforce and through simplified and one-stop access to high quality e-Learning products, tools, and services. In support of these initiatives, three interfaces were established in order to send and receive data from OPM. Modifications may be required if additional data needs to be transferred or received.

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Maintenance of EHRI interfaces will continue to be supported by the contract until IBC FPPS implementation. If the scheduled March 2014 “Go Live” date is not met, the support will continue via PeoplePlus and this contract.

Task 2.2.8 Document Management

The Contractor shall maintain functional and technical requirements documentation for all PPL-HR systems, interfaces and migrations. The Contractor shall document and maintain requirements traceability throughout the system life cycle, including, but not limited to, technical and user work instructions, standard operating procedures, and business process functionality. Documentation should be kept up-to-date as system changes are incorporated.

The Contractor will create and maintain documentation in the following areas:

- PeoplePlus Human Resources Configuration Changes - As changes and/or fixes are implemented in the system, the user documentation (i.e. work instructions and SOP's) should be updated to reflect the new system functionality. This documentation should also include any routine task, such as the annual Pay Adjustment Process document.
- Systems - The systems area provides detailed design, operation, and maintenance information about the systems architecture, applications, networks and platforms that comprise or support the PeoplePlus system. The documentation in this area should cover materials such as the system network design, interface design, technical operator's manuals and troubleshooting manuals, scripts and source code documentation. In addition, the Infrastructure Guide which includes capacity, performance, backup and server administration.
- Training - The training area provides documentation that will aid staff in training users on new or modified system features. The documentation should be clear and concise so that a HR Specialist and HR IT staff can use them for various training scenarios.
- Maintenance Trends - The maintenance trends area provides documentation on the historical usage, past performance, and problematic areas of the system and how to operate the applications used to track the system status. The maintenance information, usage tracking and statistics should already be available. It is the intent of this area that sufficient documentation exist for reasonably competent personnel to extract useful information from the maintenance trend area.
- Configuration Management (CM) - The CM area will include the Configuration Management Plan, Migration Standards and Procedures, STAT Upgrades and fixes, STAT Operational Procedures, STAT Application Configuration and STAT User Guide.

The Contractor shall keep in mind that the intent of assembling and producing these documents is to ensure the PeoplePlus system continues to function without interruption, especially during the migration to an e-government Shared Service Center provider. The Contractor must strive to provide documents that adequately cover the subject and can be easily understood.

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Documentation support will continue to be supported by the contract until IBC FPPS implementation. If the scheduled March 2014 "Go Live" date is not met, the support will continue via PeoplePlus and this contract.

Task 2.2.9 Configuration Management

An effective Configuration Management (CM) process is necessary to maintain the integrity of the system throughout its development life cycle and facilitate communication about the system among PeoplePlus team members, users, and other supporting organizations. The Contractor shall use the PeoplePlus Configuration Management Plan as a guide to manage the development and migration of the configuration management activities associated with the system. The Quest Software application STAT will be used to record change request, track status, obtain approvals and control the configuration and movement of PeoplePlus objects.

The Contractor will migrate daily STAT Customer Service Requests (CSRs) through development and testing environments, biweekly and emergency migrations to our production systems. The Contractor shall ensure there are no major errors and that migrations are completed in a timely manner. The Contractor shall continuously strive to implement, train, maintain, and provide best practice solutions and recommendations to improve the configuration management process.

The contractor shall follow the Configuration Management process that has been established between OARM and OCFO.

Task 3 Information Technology Support Services (Human Resources Line of Business)

The required IT support services cover Human Resources Line of Business (HR LOB) work that is needed to migration to an HR LOB Shared Services Center (SSC) which is IBC FPPS.

Migration preparation will continue to be supported by the contract until IBC FPPS implementation. If the scheduled March 2014 "Go Live" date is not met, the support will continue via PeoplePlus and this contract.

The following tasks must be performed at an acceptable level throughout the term of the contract.

Task 3.1 Migration to an HR LOB Shared Services Center (SSC)

The Human Resources Line of Business (HR LOB) is an e-government initiative designed to centralize and standardize government-wide HR processes and systems to provide common core functionality to support the strategic management of Human Capital in a cost effective manner. This initiative, led by the Office of Personnel Management, is part of the President Management Agenda to provide Government-wide, cost-effective, standardized and interoperable human resource solutions addressing duplicative and redundant HR systems and processes across the Federal Government. This contract covers the HR LOB migration of core and non-core HR processes - personnel actions, benefits processing and labor/employee relations. The current migration plans scheduled "Go Live" target date is March 2014.

Assistance in data mapping and development of data load files based on the mapping between PeoplePlus and IBC FPPS will be required. The data load file(s) development will be an

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iterative process leading to successful data loads with IBC FPPS. Data errors reported by IBC FPPS will be analyzed to determine if change requests are needed to correct PeoplePlus to prevent future data load errors. Once established, the program(s) and file output(s) will be used to populate history in the Datamart. The Agency would like to create historical files covering the pay periods between July 2001, and the "Go Live" pay period or any other defined pay period. Other interfaces may be required if the Agency implements an internal Performance Management and Learning Management System prior to the migration.

The Contractor shall follow OPM's policies and guidelines and use best practices when performing and executing the major migration subtasks activities as documented in OPM's Migration Planning Guidance:

Subtask 3.1.1 Data Mapping and Conversion

Confirm detailed data conversion mapping specifications provided by IBC, and develop data conversion programs, or application engine processes to build conversion files for consumption by IBC. HR file is a large fixed format personnel record data dump, containing employee data based on end of pay period values. Generated file will be transferred to IBC for test system loading and error analysis each pay period after development.

HR conversion program will also be used for population of historic data in Datamart as well.

Assist in data mapping confirmation between PeoplePlus and IBC FPPS to assure accurate system of record data is provided to IBC developers, and supporting tables at IBC match correctly.

Subtask 3.1.2 Data Errors Analysis

Analyze errors from iterative data loads at IBC and recommend strategies or production system changes to prevent future data errors.

Subtask 3.1.3 Historical Data Migration and PeoplePlus Decommissioning

As of the "Go Live" date of the IBC FPPS, PeoplePlus will no longer process personnel transactions; and IBC FPPS will be the system of record for Human Resources data. The repository for all Human Resources data prior to the "Go Live" date will be PeoplePlus. The contractor shall follow the approach that the Government has selected to migrate all PeoplePlus data to the Datamart, in accordance with the established schedule. The effort will include "cleansing" of the data to ensure successful acceptance by Datamart. The contractor shall identify the most effective method of data cleansing which may require adjustments to data or processing in PeoplePlus. The contractor shall execute those steps that will ensure a successful migration.

Utilize the conversion program developed in 3.1.1 to populate history in Datamart. This task requires a pay period end, snapshot file for the periods covering July 2001 to conversion or any other defined date. Other data conversion files may be required if the Agency implements an internal Performance Management and Learning Management System prior to the migration.

Identify options for PeoplePlus decommissioning, develop a detailed decommissioning plan, and

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execute the decommission plan if the scheduled “Go Live” date is met.

Overall throughout HR LoB all functional designs shall consider user needs and characteristics, EPA policies, requirements from the data suppliers, and best practices from industry for similar systems. The Contractor shall work with other offices in EPA (i.e. Office of Chief Financial Officer (OCFO) and Office of Environmental Information (OEI)), and the IBC as appropriate to ensure that user interface designs shall be designed and documented in conformance with EPA standards. EPA understands usability testing to be important to ensure a successful user interface design; the Contractor is encouraged to employ usability testing of its designs as appropriate.

The Contractor shall ensure that all migration software and related interface software is fully documented and such documentation remains current and appropriate for each system. Test activities including EPA and SSC technical and user acceptance testing, shall be planned and implemented. Configuration management and version control shall be rigorously enforced on all components of the PeoplePlus application.

6. CONFLICT OF INTEREST:

6.1 Organizational Conflicts of Interest (EPAAR 1552.209-71)

(a) The Contractor warrants that, to the best of the Contractor’s knowledge and belief, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest, as defined in FAR Subpart 9.5. or that the Contractor has disclosed all such relevant information.

(b) Prior to commencement of any work, the Contractor agrees to notify the Contracting Officer immediately that, to the best of its knowledge and belief, no actual or potential conflict of interest exists or to identify to the Contracting Officer any actual or potential conflict of interest the firm may have. In emergency situations, however, work may begin but notification shall be made within five (5) working days.

(c) The Contractor agrees that if an actual or potential organizational conflict of interest is identified during performance, the Contractor will immediately make a full disclosure in writing to the Contracting Officer. This disclosure shall include a description of actions, which the Contractor has taken or proposes to take, after consultation with the Contracting Officer, to avoid, mitigate, or neutralize the actual or potential conflict of interest. The Contractor shall continue performance until notified by the Contracting Officer of any contrary action to be taken.

(d) Remedies – The EPA may terminate this contract for convenience, in whole or in part, if it deems such termination necessary to avoid an organizational conflict of interest. If the Contractor was aware of a potential organizational conflict of interest prior to award or discovered an actual or potential conflict after award and did not disclose it or misrepresented relevant information to the Contracting Officer, the Government may terminate the contract for default, debar the Contractor from Government contracting, or pursue such other remedies as may be permitted by law or this contract.

(e) The Contractor agrees to insert in each subcontract or consultant agreement placed hereunder provisions, which shall conform substantially to the language of this clause, including this

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paragraph, unless otherwise authorized by the Contracting Officer.

6.2 Notification of Conflicts of Interest Regarding Personnel (EPAAR 1552.209-73)

(a) In addition to the requirements of the contract clause entitled “Organizational Conflicts of Interest,” the following provisions with regard to employee personnel performing under this contract shall apply until the earlier of the following two dates: the termination date of the affected employee(s) or the expiration date of the contract.

(b) The Contractor agrees to notify immediately the EPA Contract Level-COR and the Contracting Officer of (1) any actual or potential personal conflict of interest with regard to any of its employees working on or having access to information regarding this contract, or (2) any such conflicts concerning subcontractor employees or consultants working on or having access to information regarding this contract, when such conflicts have been reported to the Contractor. A personal conflict of interest is defined as a relationship of an employee, subcontractor employee, or consultant with an entity that may impair the objectivity of the employee, subcontractor employee, or consultant in performing the contract work.

(c) The Contractor agrees to notify each Contract Level-COR and Contracting Officer prior to incurring costs for that employee’s work when an employee may have a personal conflict of interest. In the event that the personal conflict of interest does not become known until after performance on the contract begins, the Contractor shall immediately notify the Contracting Officer of the personal conflict of interest. The Contractor shall continue performance of this contract until notified by the Contracting Officer of the appropriate action to be taken.

(d) The Contractor agrees to insert in any subcontract or consultant agreement placed hereunder, except for subcontracts or consultant agreements for well drilling, fence erecting, plumbing, utility hookups, security guard services, or electrical services, provisions, which shall conform substantially to the language of this clause, including this paragraph (d), unless otherwise authorized by the Contracting Officer.

**OHR PEOPLEPLUS HUMAN RESOURCES AND SYSTEMS OPERATION SUPPORT AND
HUMAN RESOURCES LINE OF BUSINESS SERVICES**

~ Technical Evaluation Criteria ~

Factor 1: Technical Management Plan - The contractor must be able to demonstrate its ability to perform the objectives in the Performance Work Statement (PWS). The technical management plan should provide the contractor's rationale and assumptions for accomplishing all of the tasks listed in the PWS.

1. What is your approach to project management in areas such as:
 - a. Maintaining scope, schedule and cost baseline
 - b. Quality assurance
 - c. Configuration Management
 - d. Developing Technical Project Management plan
2. What is your approach to risk management during the Task Order from both a technical and management perspective, and the planned actions to mitigate or eliminate risks from pre-transition to FPPS, to "Go-Live", to post "Go-Live" phases?
3. Explain your approach for utilizing user documentation of system changes and enhancements?

Factor 2: Technical Capabilities - The Contractor shall provide information regarding the contractor's technical capabilities and methodology for performing the tasks in the PWS and in the subtask IIR LoB. The contractor will also provide information on the Contractor's corporate experience performing similar tasks and developing similar deliverables.

1. What is your approach for managing, reconciling and reporting data residing in two different environments: current data in IBC's FPPS and historical data in EPA's PeoplePlus?
2. What is your technical approach to decommission PeoplePlus?

Factor 3: Personnel - The contractor shall provide professional qualifications and experience of the Contractor staff and principals, including education, relevant experience, certifications, and capabilities of the personnel managing assigned tasks similar to those required. Please provide a one page resume of all proposed personnel.

1. Provide a methodology for hiring, retaining and replacing key personnel based on the specific skills required with appropriately security-cleared employees to support of the EPA operations and services throughout the period of the Task Order.

Factor 4: Past Performance - The contractor shall provide three (3) relevant past performance references that clearly addresses the breadth and depth of related experience (both Government and Non-Government) within the last three (3) years. Each reference shall include the name of the customer, including the contracting agency, address, phone number, contract number, type of contract and dollar amount, period of performance, place of performance, and a brief description of the scope of work and responsibilities performed with particular emphasis on timeliness, responsiveness, professionalism, and cost control.

Past Performance Questionnaires to be submitted by the references to EPA by November 4, 2013 by 3:00 PM ET. It is the responsibility of the contractor to ensure their references submit the PPQs by the due date and time. Refer to RFP Attachment #2 – Past Performance Questionnaires.

Factor 5: Price - The cost/price evaluation factor will be based on determining cost realism and price reasonableness. Price/costs will not be scored. All work shall be performed as a Labor Hour type task order with a fixed blended hourly rate per labor category, times the amount of hours required to support this level of effort for both on and off site locations. The "blended" rate is for the purpose of accommodating the contractor to work at both on and off site. Other Direct Costs will be invoiced based on actual costs.

REP - ATTACHMENT 3:

PAST PERFORMANCE QUESTIONNAIRE

~ SOURCE SELECTION SENSITIVE INFORMATION ~

Name of Vendor Quoting: _____

Contract Information (Supplied by Vendor Quoting)

Name of Contractor: _____ Contract Number: _____

Contract Title: _____ Contract Value: _____

Type of Contract: _____ Period of Performance: _____

The ratings below are supplied by the contractor identified above, **NOT** the quoter.

N/A - Not Applicable

5 - Exceptional- Performance meets contract requirements and significantly exceeds contract requirements to the Government's benefit. For example, the contractor implemented innovative or business process reengineering techniques, which resulted in added value to the Government. The contractual performance of the element or sub-element being assessed was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.

4 - Very Good- Performance meets contractual requirements and exceeds some to the Government's benefit. The contractual performance of the element or sub-element being assessed was accomplished with some minor problems for which corrective actions taken by the contractor were effective.

3 - Satisfactory- Performance meets contractual requirements. The contractual performance of the element or sub-element contains some minor problems for which proposed corrective actions taken by the contractor appear satisfactory, or completed corrective actions were satisfactory.

2 - Marginal- Performance does not meet some contractual requirements. The contractual performance of the element or sub-element being assessed reflects a serious problem for which the contractor has submitted minimal corrective actions, if any. The contractor's proposed actions appear only marginally effective or were not fully implemented.

1 - Unsatisfactory- Performance does not meet contractual requirements and recovery is not likely in a timely or cost effective manner. The contractual performance of the element or sub-element contains serious problem(s) for which the contractor's corrective actions appear or were ineffective.

0 - Incompetent- Performance never meets contractual requirements and damages have resulted from performance. The contractual performance of the element or sub-element is totally insufficient and without merit.

Performance Elements	0	1	2	3	4	5
1. Quality of Product or Service						
2. Timeliness of Performance						
3. Effectiveness of Management						
4. Initiative in Meeting Requirements						
5. Response to Technical Direction						
6. Responsiveness to Performance Problems						
7. Compliance with Cost Estimates						
8. Customer Satisfaction						
9. Overall Performance						

10. Remarks on outstanding performance:

Provide data supporting this observation; you may continue on a separate sheet if needed.

11. Remarks on unsatisfactory performance:

Provide data supporting this observation; you may continue on a separate sheet if needed.

12. Please identify any corporate affiliations with the vendor quoting.

13. Would you do business with _____ again?
(insert quoter's name)

14. Information provided by:

Name:

Company:

Position/Title:

Mailing Address (Street/P.O. Box):

City, State and Zip Code:

Email Address:

Telephone Number:

Fax Number:

Time of Call:

Date Information provided:

Please submit this Past Performance Questionnaire electronically to Lin Pinskey via email at pinskey.lin@epa.gov and Jennifer Scharrer at scharrer.jennifer@epa.gov by November 4, 2013 NLT 3:00 PM EST. Thank you for your time.

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RFP – ATTACHMENT 4:

**Agency Personal Verification Procedures
For Contractor Personnel
October 2006**

Background: Homeland Security Presidential Directive 12 (HSPD-12), signed on August 27, 2004, requires a Government-wide, common identification standard for all Federal and contractor employees requiring physical access to Federally controlled facilities and/or logical access to Federally controlled information systems. The goals of HSPD-12 are to enhance safety and security, increase Government efficiency, reduce identity fraud, and protect personal privacy.

HSPD-12 requires that the common identification be: (a) issued based on sound criteria for verifying an individual employee's identity; (b) strongly resistant to identity fraud, tampering, counterfeiting, and terrorist exploitation; (c) rapidly authenticated electronically; and (d) issued by providers whose reliability has been established by an official accreditation process.

HSPD-12 and its common identification standard require personal identity verification (PIV), background investigations, and suitability determinations for all affected contractor and subcontractor personnel. In accordance with FAR clause 52.204-9, Personal Identity Verification of Contractor Personnel, contractors and subcontractors must comply with EPA's master plan for implementing HSPD-12.

**a) Contractor Requirements for Personal Identity Verification of Contractor Personnel
(including subcontractors)**

Contractor Employees Requiring Access to EPA facilities or EPA Information Systems for at Least 24 Hours a Week for at Least 6 Months: All individual contractor employees whose work under the contract requires on-site access to an EPA controlled facility or logical access to an EPA information system for at least 24 hours a week for at least 6 months a year, will be required to undergo a background investigation in order to receive an EPA Personnel Access and Security System (EPASS) badge.

To begin the PIV process, the contractor should submit to the Contracting Officer Representative (COR) within ten (10) days of contract award or contract modification with this Attachment to Work Statement "Agency Personal Verification Procedures for Contractor Personnel," the following information in electronic format via secure means using the HSPD-12 Contractor Template found at <http://epa.gov.oam/>. The template was developed to assist in the transmission of the required contractor employee information in a uniform format. The template also contains drop down menus when entering data in various data cells. Specifically, the 8 data elements, Employee Type, Program Office, Work City and State, Birth State, Birth Country, Citizenship, Previous Investigation and Investigative Agency, contain drop down menus.

- Contract number;
- Contract expiration date;
- Name, address, and phone number of the Contractor Program Manager point of contact;

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- Name, date of birth, place of birth (city, state, country), and Social Security Number for all contractor employees identified above. (NOTE: This information must be protected at all times, including during transmission, according to the requirements of the Privacy Act of 1974; see <http://www.epa.gov/privacy/>);
- Employee Type, Position, Email address, Program Office, Work City and State.
- An indication of which contractor employees are foreign nationals;
- Name of each contractor employee claiming to have a previous, favorably adjudicated Federal background investigation on record, and the name of the Federal Agency that required the investigation, and the completion date.

The contract-level COR will upload this information to the Office of Administrative Services Information System (OASIS) personnel security database.

After submission of the preliminary information, the contractor will be notified by the contract-level COR or PSB when to begin providing all information on Standard Form (SF) 85P, Questionnaire for Public Trust Positions, and submit the form electronically to PSB via the Office of Personnel Management's (OPM's) Electronic Questionnaires for Investigations Processing (e-QIP) system. Instructions for using e-QIP, filling out, and submitting the SF 85P on-line, can be found at <http://www.opm.gov/e-qip/reference.asp>. As part of the investigative and EPASS badging processes, contractor employees must be fingerprinted, photographed and provide two forms of identification, at a time and location specified by the COR. These fingerprints will be sent to the Federal Bureau of Investigation (FBI) for processing.

Contractor employees with a favorably adjudicated Federal background investigation at the National Agency Check and Inquiries (NACI) level or above, completed within the past 5 years and verified by EPA, do not require an additional investigation unless one is requested by the Contracting Officer (CO) or contract-level Contracting Officer Representative (COR). These employees must still be fingerprinted at a time and location specified by the COR.

In order to prevent any interruption of contractor services pending the completion of the OPM background investigation, the Office of Administrative Services (OAS) Security Management Division (SMD) has procedures in place to issue temporary or provisional badges.

When reporting in person, as directed by the contract-level COR, contractor employees must provide two forms of original identity source documents from the lists on Form I-9, OMB No.1615-0047, Employment Eligibility Verification (available at <http://www.uscis.gov/graphics/formsfsc/forms/files/i-9.pdf>). At least one document shall be a valid State or Federal Government-issued picture identification.

Contractor Employees Requiring EPA Access for Less than 24 Hours a Week for 6 Months:
These contractor employees may be subject to the above requirements, and may have limited and controlled access to facilities and information systems.

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Foreign National Contractor Employees: To be eligible to work on-site at an EPA controlled facility or to access EPA information systems, a foreign national contractor employee must have been admitted to the U.S. on an Immigrant Visa or a Non-Immigrant Work Authorization Visa. Foreign nationals requiring access to an EPA controlled facility or EPA information system for at least 24 hours a week for at least 6 months a year must meet the above requirements for an EPASS badge, and in addition:

- In the "Continuation Space" on the SF 85P, provide the visa number, issuance location, and issuance date for the visa used for entry to the U.S;
- When presenting two identification source documents, as described above, provide at least one from List A on Form 1-9.

When determining a foreign national contractor employee's eligibility for an EPASS badge, EPA will consider the type of visa presented (immigrant vs. non-immigrant) and the reciprocity agreement between the U.S. and the individual's country of origin. These considerations are in addition to the "red flag" issues listed below.

Screening of the SF 85P: Information contained on the SF 85P may demonstrate that a contractor employee is not suitable to be given access to EPA facilities or information systems. PSB will screen information entered on the SF 85P prior to OPM initiating the background investigation. For individuals with admitted, derogatory information, issuance of an EPASS badge may be delayed pending further EPA review. Contractors are responsible for providing qualified personnel in accordance with requirements stated elsewhere in this contract. Contractors will only be notified by the COR if any contractor employee is found unsuitable to perform as a result of a background investigation, and must be immediately replaced by the contractor. The following are possible "red flags":

- Employment - Having been fired from a previous job, or having left under unfavorable circumstances within the past 7 years (Question 12 on the SF 85P);
- Selective Service - Failure to register with the Selective Service System; this applies to male applicants born after December 31, 1959 (Question 17 on the SF 85P);
- Police Records - Within the past 7 years, any arrest, charge, or conviction that has been upheld for violent or dangerous behavior or a pattern of arrests that demonstrates disregard for the law (Question 20 on the SF 85P);
- Illegal Drugs - Illegal use within the previous year, or drug manufacture or other involvement for profit within the past 7 years (Question 21 on the SF 85P).

b) Returning Badges

The contractor is responsible for ensuring that all badges are returned to the COR at the conclusion of the contract or when contractor on-site services are no longer required, or when an individual contractor employee leaves.

c) Subcontracts

These requirements must be incorporated into all subcontracts wherein employees' work under the subcontract requires physical access to an EPA controlled facility or logical access to an EPA information system for 6 months or longer.

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

d) Appeals

Contractors have the right to appeal, in writing to the COR, a determination to deny or revoke badge. If the COR believes an appeal is justified, he/she will forward it to:

U.S. Environmental Protection Agency
Personnel Security Branch (Mail Code 3206M)
1200 Pennsylvania Avenue, NW
Washington, DC 20460

PSB's decision on behalf of the Agency will be final and not subject to further appeal.

e) Definitions

- "EPA Information System" means an information system [44 U.S.C. 3502(8)] used or operated by EPA, or a contractor of EPA or other organization on behalf of the Agency.
- "EPA Controlled Facilities" means:
 - EPA or Federally-owned buildings or leased space, whether for single or multi-tenant occupancy, and its grounds and approaches, all or any portion of which are under the jurisdiction, custody or control of the Agency;
 - EPA or Federally controlled commercial space shared with non-government tenants. For example, if a department or agency leased the 10th floor of a commercial building, the Directive applies to the 10th floor only;
 - Government-owned contractor-operated facilities, including laboratories;
 - The term does not apply to educational institutions that conduct activities on behalf of departments or the agency or at which Federal Employees are hosted unless specifically designated as such by the sponsoring department or agency.
- "Foreign National" means an individual who is not a United States citizen.

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

RFP – ATTACHMENT 5:

SURVEILLANCE PLAN

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.1.1	Create and Maintain a Master Schedule of all PeoplePlus projects.	Complete project schedules – task level project plan including resource assignments, shall be delivered to the COR on a weekly basis at the status meetings.	Project deadlines are captured, correctly documented and updated on a weekly basis. Schedule is provided to the COR on a weekly basis. Schedules should be accurate and complete 90% of the time.	Weekly Status meetings with functional experts.	COR, and Technical and Functional Leads
5.1.2	Create and submit weekly project status reports and monthly status and system reports.	A Status report shall be provided to describe the activities that took place during the last weekly and monthly time period. Report should be delivered to the COR in accordance with 5.1.2 of the PWS.	Changes to reports are submitted on time, with no more than two mistakes per report.	Monthly progress and Time Management report.	100% COR review
5.2.1.1	Review, analyze and interpret changes to law and regulations that affect HR supported systems.	Keeps abreast of federal HR rules and regulations that could possibly impact HR systems.	Proposals (CSRs) for system enhancements/changes are submitted to the Technical and Functional Leads within two weeks of the published notice.	Weekly progress report(s).	Functional and Technical Team Lead, COR

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

SURVEILLANCE PLAN (Continued)

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.2.2.1	Maintain PeoplePlus Human Resources System	Resolve pay impacting issues/problems with the system within the pay period it's identified. Other system issues identified are responded to within one pay period. Provide suggestions for system enhancements and improvements.	Pay impacting issues are resolved within the pay period identified. Accurately identify the issues and fixes based on agreed upon timeframes with no more than two instances of improper fixes. CSRs are migrated the proposed effective date and there is no unfavorable system impact of the migration(s) (no more than two instances of system downtime after migration). Checks DFAS interface updates daily; preparing project documents within three days of approval. Monitors all interfaces daily, reporting anomalies within 24 hours (MyPay, DFAS SF-50 and Non-SF-50).	STAT Reports, User Work Instructions for new processes, and Functional Lead; employees adversely affected. Weekly progress report (these are sometimes pay impacting, so we need to see the results sooner).	Functional and Technical Leads, COR Technical and Functional Team Lead; COR Review
	PeoplePlus and DFAS Interface updates and daily interface files.	Accurate and complete project documents shall be delivered to the COR within 3 days of approval. All interfaces are monitored on a daily basis (MyPay, DFAS SF-50, Non SF-50).			

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

SURVEILLANCE PLAN (Continued)

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.2.2.2	Perform Database Administration.	Execute maintenance activities on schedule or as required per vendor to minimize issues and poor database performance. Database administration tasks in accordance with 5.2.2.2 of the PWS.	Performed per schedule.	Database Maintenance Schedule and Tracking activities in STAT.	100% COR review
5.2.2.3	Support Infrastructure	Perform schedule monthly maintenance or as required. Provide weekly or monthly system metrics to measure system performance in accordance to 5.2.2.3 of the PWS and documents shall be delivered to the COR.	Performed per schedule	Monthly progress report. Maintain in STAT.	100% COR review
5.2.2.4	Create Report Management methodology to serve EPA organizations.	Strategically generate reporting methodology to automate and streamline reporting processes and develop reports according to requirements and regulations.	No more than two errors or two occurrences of the same error on a given report or report process. Minimal negative impact to business customers. Successfully streamlines and simplifies the reporting strategy as measured by increased customer satisfaction and reduction in complaints.	Monthly progress report in STAT.	100% COR review

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

SURVEILLANCE PLAN (Continued)

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.2.2.5	Analyze issues root cause and recommend problem resolution. Produce reports for HR community that identifies negative data anomalies (debt creations, TSP refunds, NTE expiration dates, daily edits, etc.)	Develop customization to provide solution to minimize reoccurrence. Maintain version control and exercise Configuration Management in accordance to 5.2.2.9. Provide to Functional Lead the last day of the pay period (2 nd Friday) of the pay period. Report is based on SF-50 and non SF-50 fields in PPL. Daily edits are provided via worklists by SSC.	Root causes are accurately identified and appropriate system changes are made to eliminate problem. No more than two instances of the same problem occurring without adequate fixes in place. Data anomalies are identified bi weekly and worked with SSC at employee level. Daily rejected personnel records are sent to SSC Work Lists.	STAT's CSRs and Functional leads. Bi Weekly reports received by COB 2 nd Friday of pay period.	100% COR review Functional Team Lead
5.2.2.6	Apply system customization and upgrade.	Design, develop, test and deploy changes to system as needed. Comply with EPA/Federal HR policy, and Section 508 of the Rehabilitation Act.	No more two errors on same changes in application, process and reports when submitted after the due date. Customizations are migrated within the scheduled proposed effective date and there is no unfavorable system impact of system migration(s) (no system downtime after migration).	STAT's CSRs and Functional Leads.	100% COR review

PeoplePlus Human Resources and Systems Operation Support and Human Resources Line of Business Services

SURVEILLANCE PLAN (Continued)

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.2.2.7	Maintain EHRI, eOPF, SF182 Interfaces.	Maintain the EHRI eOPF and SF182 interface files, should be sent and received on scheduled basis.	Expect recommendation to resolve high occurrence of the same type of users errors in SF182. eOPF errors resolved in next pay period. System/program issues are identified and resolved before the next interface submission of eHRI. No more than two instances of failures due to contractor action/inaction.	Monthly progress report and Functional Team Lead.	COR and Functional Lead
5.2.2.8	Create and maintain PeoplePlus and DCPS Interface documentation; Functional Documentation; Technical Documentation, System SOPs, Configuration Management Documentation and Training Documentation.	Document and update all documentation supporting PeoplePlus environment.	All system changes/ enhancements are finalized within two weeks of final migration.	Functional and Technical Team and STAT CSRs.	100% COR review
5.2.2.9	Maintain Configuration Management (CM) throughout development lifecycle. Perform migration and CM verification to ensure integrity is consistent.	Follow the defined CM process to maintain continuity and integrity of PeopleSoft code databases on the migration path. Maintain version control and exercise Configuration Management in accordance to 5.2.2.9. Migrate all development throughout the migration path as defined in the CM process as needed, scheduled and as emergency. Follow accordance to 5.2.2.9.	Violations are no more than six in a fiscal year. No more than four violations during a fiscal year.	STAT's CSRs and CM Team. STAT's CSRs and CM Team.	100% COR review 100% COR review

SURVEILLANCE PLAN (Continued)

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.3.1	Support HR LOB Migration.	Follow OPM's policies and guidelines using best practices throughout the HR LOB migration major phases.	No more than two errors per task and deliverable. Required documents are submitted on time.	Monthly progress report, STAT time management, deliverables.	100% COR review
5.3.1.1	Map and Convert Data.	Map the correct data fields to IBC define file structure. Assure accurate system of record data is provided to IBC developers, and supporting tables at IBC match correctly. Develop program to populate of historic data in IBC data mart application.	Interface files should not contain more than two errors type. Resolution is expected by next submission.	STAT's CSRs Functional and Report Leads.	100% COR review
5.3.1.2	Analyze Data Errors.	Analyze errors from iterative data loads at IBC and recommend strategies or production system changes to prevent future data errors. Expect reduction of error types after implementing strategies.	No more than four mistakes on same error types. Root causes of errors are accurately identified with recommend strategies provided on a timely basis.	STAT's CSRs and Functional Leads.	100% COR review

SURVEILLANCE PLAN (Continued)

PWS Reference	Activity	Standard	Acceptable Performance Level (APL)	Measurement (Source)	Surveillance Method
People-Plus - PROJECT SUPPORT SERVICES					
5.3.1.3	Capture, verify and export historical data to SSC.	Utilize the conversion program developed in 3.1.1 to populate history in the SSC Data Mart application. Correct data must be in the correct pay period end, snapshot file for the periods covering July 2001 to conversion. Other data conversion files are expected to have minimum errors to import into Agency internal Performance Management and Learning Management System prior to the migration.	Expect data to have correct data for each pay period. Expect all errors to be eliminated for acceptance. This is an SSC function to fix the errors. Provide assistance in import/export and verification of errors.	STAT's CSRs and Functional Leads.	100% COR review
5.3.1.4	Decommission PeoplePlus.	Follow OPM's policies and guidelines using best practices to develop and execute plan.	PeoplePlus is decommissioned according to agreed plan and schedule.	STAT, Infrastructure team.	100% COR review

RFP ATTACHMENT 6:

**OHR PEOPLEPLUS HUMAN RESOURCES AND SYSTEMS OPERATION SUPPORT AND
HUMAN RESOURCES LINE OF BUSINESS SERVICES**

FAR Clauses

- 52.252-2 Clauses Incorporated by Reference – (Feb 1998)
- 52.204-3 Taxpayer Identification (Oct 1998)
- 52.204-6 Data Universal Numbering System (DUNS) Number (Apr 2008)
- 52.204-7 Central Contractor Registration (Apr 2008)
- 52.204-9 Personnel Identity Verification of Contractor Personnel (Jan 2011)
- 52.212-3 Offeror Representations and Certifications - Commercial Item (May 2011)
- 52.212-4 Contract Terms and Conditions - Commercial Item (June 2010)
- 52.212-5 Contract Terms and Conditions required to implement Statutes or Executive Orders – Commercial Items (Aug 2011)
- 52.216-31 Time & Materials Labor-Hour Proposal Requirements – Commercial Item (Feb 2007)
- 52.217-5 Evaluation of Options (Jul 1990)
- 52.217-8 Option to Extend Services (Nov 1999)
- 52.217-9 Option to Extend the Term of the Contract (Mar 2000)
- 52.219-11 Special 8(a) Contract Conditions (Feb 1990)
- 52.219-12 Special 8(a) Subcontract Conditions (Feb 1990)
- 52.219-14 Limitations on Subcontracting (Dec 1996)
- 52.219-17 Section 8(a) Award (Dec 1996)
- 52.224-2 Privacy Act (Apr 1984)
- 52.232-7 Payments under Time & Materials and Labor-Hour Contracts (Feb 2007)
- 52.232-8 Discounts for Prompt Payment (Feb 2002)
- 52.232-9 Limitations on Withholding of Payments (Apr 1984)
- 52.232-18 Availability of Funds (Apr 1984)
- 52.232-19 Availability of Funds for Next Fiscal Year (Apr 1984)
- 52.232-22 Limitation of Funds (Apr 1984)
- 52.232-33 Payment by Electronic Funds Transfer (CCR) (Oct 2003)

52.234-4 Earned Value Management System (Jul 2006)

52.237-3 Continuity of Services (Jan 1991)

52.243-3 Changes Time & Materials or Labor-Hours (Sep 2000)

52.246-6 Inspection Time & Materials and Labor-Hour (May 2001)

52.246-11 Higher-Level Contract Quality Requirements (Feb 1999)

EPA Clauses

1502.100 Definitions

1552.209-70 Organizational Conflict of Interest Notification (Apr 1984)

1552.209-71 Organizational Conflict of Interest (May 1994)

1552.209-72 Organizational Conflict of Interest Certification (Apr 1984)

1552.209-73 Notification of Conflicts of Interest Regarding Personnel (May 1994)

1552.211-79 Compliance with EPA Policies for Information Resources Management (Oct 2000)

1552.223-71 EPA Green Meetings and Conferences (May 2007)

1552.235-79 Release of Contractor Confidential Business Information (Apr 1996)

1552.242-71 Contractor Performance Evaluations (July 2011 Deviation)

1552.232-70 Submission of Invoices (JUN 1996)

CUSTOM - TAX

The Federal Government is exempted from paying taxes. The tax exempt number is 52-085-2695.

CUSTOM – CONTRACT INVOICES RTP-FINANCE (OCT 2011)

Invoices shall be prepared containing the following information:

- Date of Invoice
- Invoice number
- Total Amount Billed
- EPA Contract number
- Complete company name and billing address as stated on the contract or order.
- Period of performance, where applicable
- Description of commodities/services furnished
- Duns & Taxpayer Identification Number Bank for EFT payment, bank name, address, account number and routing number, if not in the Central Contractor Registration System, (CCR)
- Point of contact (POC) name and phone number

Contract invoices shall be submitted to the address specified below -OR- submitted via e-mail to:
DDC-KInvoices@epa.gov using the following procedures:

- Attach the Invoice PDF file to the email with the following naming convention and SUBJECT line: Contract #, Invoice # and Delivery Order # in the SUBJECT line of the email (Example: I_68w09999_234B_00005.pdf). No follow-up hardcopy for the Finance Center is required.
- Email body:
 - Submit no correspondence in the body of the email and do not include any attachments which are not invoices.
 - Provide all relevant information within each invoice attachment. Invoice page 1 must be first page of image.
 - It is suggested that the following statement be included in the email body: "NOTICE: this email data is for the designated recipient only and may contain privileged or confidential information. If you have received it in error, please notify the sender immediately and delete the original. Any unauthorized use of this email is prohibited."
- Each invoice must be signed by a representative of the contractor that is fully and completely authorized to sign on behalf of the contractor. The representative must also print their name, direct dial phone number, and email address.
- Attachment file name protocol is very important (invoice may be rejected if pdf naming protocol is incorrect). Please submit using the following attachment name fields separated by **underscores**:
 - Contract number: Field is 8 digits (for non-EPA contracts we use the first two digits and the last six digits)
 - Invoice number: Field is 11 digits. Please do not exceed 11 digits per invoice #. However any invoice which exceeds the 11 digits will be entered using the 11 digits starting from the right. Numbers should not begin with a zero or with a special character. Invoice #s should not include an underscore or a '/'
 - Order number: Field is 5 digits (if no order#, please enter '00000' or simply end with the .pdf)
 - Fields for contract # and invoice # should be separated by underscores (Example: I_EPXX9999_STB-300_00001.pdf)
- Receipt date for invoices will be the date RTP-FC retrieves and successfully opens the invoice attachments. If invoices are sent on a weekend or federal holiday, or after 3 p.m. (EST or EDT) on a regular work day, the receipt will be dated for the next business day.
- Submitted invoices which do not conform to these procedures may be determined to be an inappropriate submission and are subject to rejection.

If you are unable to submit your contract invoice via email, please use the mailing addresses below:

U.S. Postal Service	U.S. Environmental Protection Agency RTP-Finance Center (D143-02) Durham, N.C. 27711
UPS, Federal Express, or Overnight Mail	U.S. Environmental Protection Agency RTP-Finance Center 4930 Old Page Road (D143-02) Durham, N.C. 27703

For Contract invoicing or other issues, please contact EPA's Financial Office Customer Service at: (919) 541-1148, or via email at: ContractPaymentInfo@epa.gov.

Payment information and notification may be accessed by registering with the Department of Treasury's Internet Payment Platform (IPP) system at: <https://www.ipp.gov/>.